

Luma Budget Quick Reference Guide (QRG)

Group & Temporary (4300)

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Initiator: Any budget employee

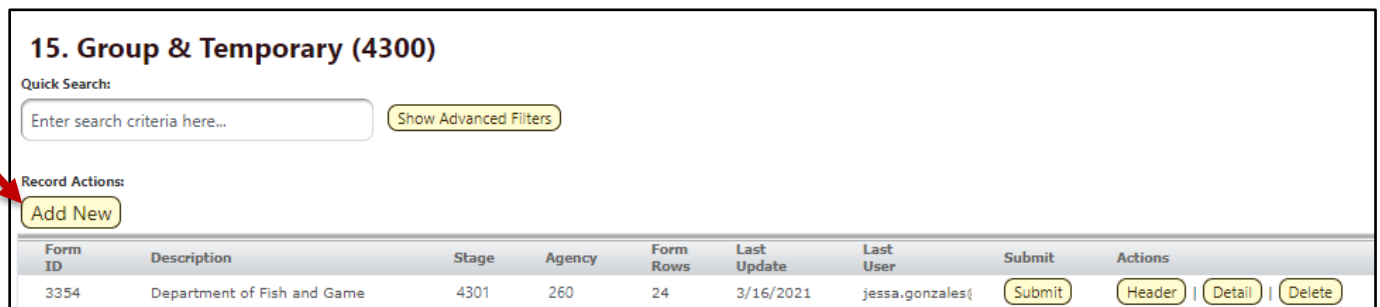
Reason: To fill out the necessary forms in the budget.

This Budget Form is where agencies will report on any group/temporary positions necessary for their agency. The purpose of this form is to allow the information on the Personnel Cost Forecasting (PCF) report to be loaded into the system.

This form and many other Budget Forms in this system contain information for the PCF report. They are the following:

- Supplemental & Line Item Requests (5100)
- 8 series Transfer Request Form (5600)
- Fund Vacant Position Form (6300)
- Salary & Benefit Changes Form (6200)

These forms will complete the Personnel Costs (PC), which will upload to the PCF report. If your agency does not have a PC expense in your base budget for Group/temporary positions, do not complete this form.



15. Group & Temporary (4300)

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#)

Form ID	Description	Stage	Agency	Form Rows	Last Update	Last User	Submit	Actions
3354	Department of Fish and Game	4301	260	24	3/16/2021	jessa.gonzales@	Submit	Header Detail Delete

Parent Transactions Entry

After selecting "Add New" the Create a new Budget Form – 4300 Screen will appear.

Create a new Budget Form - 4300

[Close](#)

Stage:*

Agency:* [Search](#) [X](#)

[Save](#) [Cancel](#)

To start the parent transaction, enter a stage and your agency number. Select “Save” when entry is complete. The system will proceed to the Header Tab.

Header Tab

This tab has no narrative for agencies to enter. If there is additional explanation needed, the “Attachments” tab is available for supporting documentation

Proceed to the Group Position Funding Tab.

Budget Form Header

[Comment History](#) [Comment](#) [Submit](#) [Close](#)

Instance ID	Form Definition	Definition Name	Name	Agency
3071	4300	15. Group & Temporary (4300)	State Treasurer	150

Stage Code:* Agency

Initial Entry State Treasurer

[Header](#) [Detail](#) [Group Positions](#) [Attachments](#)

Name:* [Save](#)

Analyst's Comments

Group Position Funding Tab:

This tab enables agencies to enter the Group/Temporary position using two options. By either selecting the New Position button or uploading the agency request using an export/import option. The method selected will depend on what functions need to be performed on the entry.

Form Positions

Page Actions:

Close New Position Template for Group Pos Import for Group Pos Calculate Status Refresh

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
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Adding a Position with the “New Position” Action:

When selecting “New Position”, the “Add a New Position” screen will appear.

Position Wizard - Add a New Position

Configuration Close

Step 1 of 7

Job Class:*

Advance to Finish Cancel

Select a Job Classification.

When budgeting for Group/Temporary Position(s), there is only one (1) classification available.

The screenshot shows a 'Lookup' window with a 'Quick Search' field and a 'Cancel' button. Below the search field is a table with three columns: 'Select', 'Code', and 'Name'. The table contains one row with the code '90000' and the name 'GROUP POSITION , Std Benefits/No Ret/No Health'. A 'Select' button is next to the code. At the bottom right of the table, it says 'Records: 1 - 1 of 1 - Pages: 1'.

Select	Code	Name
Select	90000	GROUP POSITION , Std Benefits/No Ret/No Health

Records: 1 - 1 of 1 - Pages: 1

90000 = Group Positions, Standard (Std) Benefits/No Retirement (Ret)/No Health Benefit

Standard Benefits include; Life insurance, Workman's Comp., Medicare, and Social Security expenses.

Note: If agencies are budgeting or requesting "Benefited" Group/Temporary positions (including health insurance or retirement), they will then need to record the benefits in the Detail tab of the form to report on the Health and Retirement costs of the Benefitted Group Position(s). However, the total Group/Temporary benefit amount can be entered in Luma Budget as one entry in the Detail Tab.

Click "Advance to Finish". This will open the "Position Wizard". The example shown below is a request for three (3) Group/Temporary positions with Standard/Health Benefits at a salary of \$50,000.00 annually. To be funded from the Administration Appropriation Unit in the General Fund.

Position Wizard - Add a New Position

Combined Wizard Steps 2 - 7

Position Code:* NEWP-268787 Job Class:* 90000
GROUP POSITION , Std Benefits/No I

Position Fields

Position Name:* GROUP POSITION , Std Benefits/N

Type:* 1 - Permanent Positions

Vacant Option: 1:1

Step:* 2
80% of Policy
[Lookup Salary Table](#)

Salary Override:* ☒

Override Salary:* 50000

Employee Count:* 3

% Full Time (100%=1.00)*: 0

Approp:* STAA
State Treasurer

Fund:* 10000
General Fund

Org Unit:* 0
Not Assigned

Decision Unit:* 0
None Needed

Program:* 0
Not Assigned

Project:* 0
Not Assigned

Account:* 501
Employees - Temp

One-Time / On-Going:* OG
On-Going

[Finish](#) [Cancel](#)

1. **Type** – Select “Board & Group Positions”.
2. **Salary Override** – Check the “Salary Override” box.

Note: there is no paygrade for these positions so it will default to \$100,000 if “Salary Override” is NOT selected.

3. **Override Salary** – Enter in the appropriate salary amount.
4. **Employee Count** – Fill in how many positions are being requested.
5. **% Full Time (100%=1.00)** – ***For Group and Temporary this should be **Zero** so it will not add to the overall FTP count. This will be the same entry when requesting a Group position(s) in the Supplemental & Line Item Request form (5100) if it is an increase to the base budget.
6. **Approp** – Select the appropriation unit funding the position(s).
7. **Fund** – Select a fund.
8. **Account** – Will default to 501, leave this value.

9. **OG/OT**- This will default to ongoing.
10. Select **“Finish”**.

Note: Those agencies budgeting at a lower level (Org Forms) can fill in the applicable data categories – (Org. Unit, Program, and/or Project.)

As shown below, it will populate a line for every position reported. Select “Calculate”/“Refresh” to populate the salaries and the standard benefits. This can take 45 seconds or longer to populate. At this point, if any edits to the position are needed, utilize the “Edit” button. This can be done before, during, or after the calculation is complete.

Form Positions
Page Actions:

Close
New Position
Template for Group Pos
Import for Group Pos
Calculate
Status
Refresh

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1468 (0)	Form Position	1	0.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1469 (0)	Form Position	1	0.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1470 (0)	Form Position	1	0.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results

When selecting the “Edit” button, nothing from the “Employee” tab can be changed but edits on the “Salary” tab can be done. The salary can be changed, for example, if a position is going from full-time (100%) to a part-time position (50%) by reducing the Salary and Benefit percentages as shown below.

Note: This is different for existing or new permanent positions where the change would be in the % Full Time (100%=1.0) would be changed to .50 (or other amounts as appropriate) to note the positions overall percentage change.

Edit Form Position

Page Actions: [Close](#) [Manage Funding Date and Allocation Records](#) [Audit Trail](#)

BFM_100001 - Z1470 was successfully updated.

Position	Employee Code	Last Name	First Name	Home Orgn	Job Class
NEWP-268787	Z1470	Form Position		STAA	90000

Employee Code*: Last Name: First Name: MI: [Save](#)

Employee ☐ Salary ☒

Salary Table:

Non-Classified

Grade:

Step:

Salary Override: ☒

Override Salary:

Non Step Table:

Salary Percentage:

Benefit Percentage:

Employee Count:

% Full Time (100%=1.00):

The ability to edit the Funding Dates and Allocation for a position is also available on this screen.

Note: If you are changing a group position to a part-time permanent position that can not be done on this form. You can “Unapprove” the position and then make the requested change in a Supplemental/Line Item request.

Form Positions

Page Actions: [Close](#) [New Position](#) [Template for Group Pos](#) [Import for Group Pos](#) [Calculate](#) [Status](#) [Refresh](#)

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1468 (1)	Form Position	1	0.00	True	\$50,000.00	\$3,995.00	\$53,995.00	Edit Unapprove Results
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1468 (1)	Form Position	1	0.00	True	\$50,000.00	\$3,995.00	\$53,995.00	Edit Unapprove Results
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1470 (1)	Form Position	1	0.00	True	\$25,000.00	\$1,997.50	\$26,997.50	Edit Unapprove Results

All the positions above are automatically “approved”. Select “Calculate” and “Refresh” to populate the salary and benefits. *For the 90000-job class, the system will still calculate Social Security, Medicare, and Unemployment Insurance in the benefit column.* The breakdown can be viewed by selecting the “Results” button.

The “Status” button above will allow the users to see how the calculation record is processing.

When adding a new position, the system will auto-assign a position number. It will begin with NEWP-xxxxxx. This will be the indicator for a new position. However, these positions with a NEWP indicator will NOT be uploaded in the Employee Maintenance table, therefore will not be able to be transferred in the 8 series Transfer Form (5600). There is another process to address this issue.

Export and Importing the Group Positions:

The only way to add a New Group Position and have the ability to transfer the request in the 8 Series Transfer Form (5600) is to upload the position requests and manually assign a Position # to each of the requests. Looking at the above screenshot, the top two entries are an example of this. The first position number GP15002 is manually assigned by an upload. The NEWP #'s are the system assigned that cannot be transferred.

Below is a screenshot of the Template for Group Position export. Fill in the Position Number with a manual number. Suggesting “GP” designating a Group Position, your agency number and a counter. This methodology can easily identify a position number as a group entry.

Note: The same assigned group position number is not able be used more than once. If there is more than one person entering or transferring these positions in the system, an easily identifiable position number is recommended. This will also be useful in reporting.

Position Number*	Job Class*	Salary Amount*	Approp*	Fund*	Org Unit*	Program*	Project*	Alloc % * (100 = 100%, 50=50%)
GP1500002	90000_N	30000	STAA	10085				100

Once the template has been completed, select “Import for Group Position”.

Once the position is uploaded the same functionality is available as with the “New Position” method, including the “Edit” functionality.

Note: There is no position delete. The only option is to “Unapprove” the position (ensuring the salary and benefits show zero) or delete the parent transaction and start over.

8 Series Transfer Form

To transfer a Group Position, go to the DU 8 Series Transfer (5600) form. Initiate a transfer and in the “Position Tab”, then select “Employee Changes”.

Budget Form Header

Comment History Comment Submit Close

Instance ID: 3802 Form Definition: 5600

Stage Code*: 5601 Agency: 150
Initial Entry State Treasurer

Header Detail

Form Positions

Page Actions: Close Employee Changes Template for Allocation Change Import for Allocation Change Calculate Status Refresh

Enter search criteria here...

Position Code	Approp	Job Class	Employee (Allocs)	Count	FTP	Approval	Salary	Benefits	Total	Actions
Screen Name Not Set in Customization										

When that is open, it will go to the Employee Maintenance Table. Scroll or advance to the group positions that you added in the “Group and Temporary Positions” form. Or if you remember the position number you can use the quick search window.

Employee Maintenance

Close

Quick Search: Enter search criteria here...

Position	Position Name	Job Class	Employee	Name	Home Orgn	Employee Count	Status	Actions
1507771	DEPUTY TREASURER	22302	71255-F1998	Scott A Stevens	STAA	1	Form	
1507772	DEPUTY TREASURER	22302	900	Shawn W Nydegger	STAA	1	Original	Select
1507773	TREASURY OFFICER	22306	Z1507773	VACANT	STAA	1	Original	Select
1507773	TREASURY OFFICER	22306	Z1507773-F2438	VACANT	STAA	1	Deleted	
1507773	TREASURY OFFICER	22306	Z1507773-F3228	VACANT	STAA	1	Deleted	
1508885	TREASURY OFFICER	22306	60639	Paul B Stewart III	STAA	1	Original	Select
1508888	DEPUTY TREASURER	22302	73478	Angela M Greene	STAA	1	Original	Select
GP1500001	GROUP POSITION, Std Be	90000	GP1500001	Group Position	staa	1	Deleted	
GP1500002	GROUP POSITION with Nc	90000_N	GP1500002	Group Position	STAA	1	Original	Select
GP1500003	GROUP POSITION	90000	GP1500003	Group Position	STAA	1	Deleted	
GP150002	GROUP POSITION	90000	GP150002	Group Position	STAA	1	Deleted	
GP150004	GROUP POSITION	90000	GP150004	Group Position	STAA	1	Deleted	
GP150005	GROUP POSITION	90000	GP150005	Group Position	STAA	1	Deleted	
GP1501001	GROUP POSITION, Std. Be	90000_HR	GP1501001	Group Position	STAB	1	Deleted	
NEWP	GROUP POSITION with Nc	90000_N	NEWP	Group Position	staa	1	Deleted	

Records per page: 50 Records: 47 - Page: 1

If a transfer needs to be completed, chose “Select” and start the transfer process.

Detail Tab in the 4300:

The Detail tab in this form is available to add any lump sum group budget amounts if agencies do not want to budget by position(s) and to enter any additional benefits that are associated with the Group/Temporary positions such as noting any budgeted health benefits or CEC that is in the base budget.

Note: If any of these requests are an increase to the base budget, they will need to be entered in the “Line Item & Supplemental Request” form (5100).

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	Group Salaries	Group Benefits	Group Total
3801	4300	150 - State Treasurer	15, Group & Temporary (430	\$155,000	\$10,000	\$165,000

Quick Search: Enter search criteria here...

Actions: Add New Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	Group Position Amounts*	Comments / Notes
There are no records available.										

Records per page: 50

Records: 0 - 0 of 0 - Pages: 1

Opening the detail tab the totals from the requested positions are noted. To add benefits select “Add New”.

Budget Form Entry - Add New Line

Page Actions: Close

Form ID	Form Definition
3801	4300

Approp*: STAA
State Treasurer

Fund*: 10000
General Fund

Program: 0
Not Assigned

Project: 0
Not Assigned

OG / OT*: OG
On-Going

Account*: 513
Health Benefits

Org Unit:

Save Cancel

Comments / Notes:

Group Position Amounts*: 12930

Audit Text:

The “Add New Line” screen will appear. Fill in all the appropriate information and select “Save”. Here are the accounts that are appropriate to use make adjustments on this form: Employees - Temp (501), Employee Benefits (512), or Health Benefits (513).

Lookup

Quick Search:

Select	Code	Name
<input type="button" value="Select"/>	500	Employees
<input type="button" value="Select"/>	501	Employees - Temp
<input type="button" value="Select"/>	503	Brd/Cmsn Members
<input type="button" value="Select"/>	512	Employee Benefits
<input type="button" value="Select"/>	513	Health Benefits

Records: 1 - 5 of 5 - Pages:

Below shows adding Health Benefits to one of the Full Time Group Positions.

Budget Form Lines

ID	Form	Agency	Form Name	Group Salaries	Group Benefits	Group Total
3801	4300	150 - State Treasurer	15. Group & Temporary (4300)	\$155,000	\$22,900	\$177,900

Quick Search:
Enter search criteria here...

Actions:

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	Group Position Amounts*	Comments / Notes
1		STAA	10000	0	0	0	513	OG	12,900	

Records per page: 50

Records: 1 - 1 of 1 - Pages: 1

The “Copy” and “Export”/“Import” options are available on this tab as well.

Attachment Tab:

Same functionality as in other Budget Forms. To print any of the attached documents, open the Attachment tab and select the documents for print.

Result

You have successfully completed the Group & Temporary (4300).

For additional training, please visit the SCO website and Luma training in the Training tab.

Date: April 9, 2021

Version 1